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28 July 1955

MEMORANDUM FOR: Career Council

SUBJECT: Revision of Fitness Report Form No. 45, 1 October 1954

1. Simultaneous with the adoption of the Fitness Report, the Agency Career Council directed that studies be initiated toward its improvement. The Director of Personnel requested the Assessment and Evaluation Staff, Office of Training, to undertake these studies. Results to date are incorporated in an attached proposed revision of the form (TAB A) and in recommendations concerning policies and procedures surrounding its use.

2. The proposals and recommendations are based on the following steps in which the Office of Personnel and Office of Training have cooperated closely:

- a. Analyses of the supervisors' replies to a questionnaire on the current Fitness Report.
- b. Statistical studies of how supervisors are using the form.
- c. Interviews with 16 supervisors, career management and personnel officials conducted by
- d. Development of a revision as the best means of clarifying issues and providing the basis for discussion.
- e. Submission of this revision to 60 supervisors and personnel officials in a series of 11 meetings. Each group spent a minimum of two hours in analyzing and discussing the report and possible policies.
- f. Further revision in close cooperation with OP.
- g. Presentation to a Career Council task force of the basis for the revision and accompanying recommendations.
- h. Submission in near future of the new revision of the form to the 60 supervisors, along with a brief questionnaire to determine whether the sense of their criticisms and recommendations had been carried out.

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3. My major conclusions at this point are:

- a. If every criticism were accepted, there would be no part left of either the present form or the proposed revision; if every suggestion for addition were accepted, the form would approximate book size.
- b. With all its defects, the present report has not aroused overwhelming opposition among supervisors. Hence, precipitous change is not necessary.
- c. "To show or not to show" the report to the subordinate—that is the most controversial issue concerning fitness reporting.
- d. The proposed revision is on the right track, having been preferred over the present form by all who have seen it.
- e. The present report requires too much information about individuals (1) in certain-type jobs, and (2) when the supervisor has known the individual for a very short period.
- f. Changes in fitness report forms and procedures should be evolutionary and involve wide contact with and explanation to supervisors.

4. Major conclusions concerning the "show-not show" issue are:

- a. The present policy is not working in accordance with the original intent that supervisors make the decision on whether or not to show the report. Office-wide policies have been adopted on this question.
- b. There is a sizable minority, if not a majority, who oppose present policy because it is not consistent across the Agency.
- c. A majority would approve showing a report concerned with job performance and designed to help the supervisor deal more effectively with his subordinates.
- d. A minority will strongly resist showing a form which is not designed for that purpose.
- e. A majority would approve a report which is a privileged communication to management, provided there existed a report that could be shown.

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- f. A small minority will oppose any privileged communication of any type.
 - g. The greatest approval would be obtained for a form designed to show, with the policy to show unless the supervisor felt it unwise. In such an instance, he would explain on the form why he did not show the report.
 - h. A majority would approve two especially designed reports, one to promote effective dealing of supervisor with subordinate, the other a privileged communication to management.
 - ✓ 1. The present form does not lend itself to a clear-cut show-not show policy since opinion on showing it is close to being equally divided.
5. It is recommended that
- a. The proposed form, with whatever minor changes that are made as a result of Paragraph 2h, be adopted.
 - b. The form be divided into two physically separate parts, the one to be concerned with job performance and the other with potential.
 - c. Part I and Part II both be used for the annual report.
 - d. Part I only be used for
 - (1) Special reports (changes in assignment, changes in supervisor)
 - (2) Individuals on jobs not requiring the type of information obtained in Part II.
 - e. Part I be treated as a step toward a form and procedure which will really be helpful to the supervisor in dealing with his subordinates and the policy of showing be optional with the individual supervisor, with action taken explained on the form.
 - f. Part II be treated as a privileged communication from the supervisor to management above him and the policy be that it not be shown to the subordinate.

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- g. The report be given a trial run in one small office (where not more than 25 people are available to be rated) in each major component of the Agency.
- h. The adoption of the report Agency-wide be preceded or accompanied by a training program involving selected supervisors, career management and personnel officials. They should be selected to provide in each office or division a small group, available for at least a year after introduction of the report, to answer questions that will arise among supervisors generally.
- i. The Career Council
 - a. Adopt in principle the philosophy concerning fitness reporting expressed in the attached paper (TAB B).
 - b. Direct the Office of Personnel and the Assessment and Evaluation Staff, OTR, to continue their studies to adapt fitness reporting forms and procedures to the ends served.
 - c. Direct the Office of Personnel and the Assessment and Evaluation Staff, OTR, to exert special and immediate effort to develop separate procedures for the purposes of (1) helping the supervisor deal more effectively with his subordinates, and (2) providing management with the kind of information it needs to improve its action in personnel matters.

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Chief
Assessment and Evaluation Staff
Office of Training

2 Enclosures

- TAB A - Proposed Revision
- TAB B - "Developing A Fitness Reporting System"

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